

**THE NOTES BELOW REPRESENT NOTES
AFTER THE SECOND CHECK HAS BEEN
COMPLETED. NO FURTHER
DOCUMENTS WILL BE REVIEWED PRIOR
TO HEARING.**

Proposed Local Rules have been posted and can be viewed by visiting
<http://www.sbcounty.gov/courts/pdfs/misc/proposedrules.pdf>

The court welcomes your comments on these proposed rules. Please send them via E-mail to dmeyers@courts.sbcounty.gov or mail them to San Bernardino County Superior Court, 303 West Third Street, Mail Stop 240, San Bernardino, CA 92415. Comments are due by May 12, 2008. If sending comments close to the end of the comment period, please email only.

The Probate Examiners can be reached at ProbateNotes@courts.sbcounty.gov. Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. PLEASE DO NOT SEND EMAILS TO STATE THAT DOCUMENTS HAVE BEEN FILED, TO REQUEST A CONFIRMATION OF WHETHER DOCUMENTS HAVE BEEN RECEIVED, OR TO REQUEST THE CLEARING OF NOTES. No legal or procedural advice may be given.

Rancho Cucamonga District
CIVCAL4 Rancho District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH **PROBATE**

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: GARRS700070

CASE NAME: SAMANTHA ANDERSON

SEE ALSO 2 AND COMPANION FILE PROPS0700743 E1 PAGE 7.

HEARING:
Hearing Re: Visitation.

COUNSEL:
GRACE BLACKMON (PET)...JAMES B CHURCH
SAMANTHA ANDERSON (MIN)...ELIZABETH MCDONOUGH
DOUGLAS ANDERSON (RES)...GREGORY T ANNIGAN

RELATED CASE PROPS0700743:
See notes in matter 7

GENERAL INFORMATION
Continued from 02/11/08. At the 02/11 hearing, court and counsel conferred on the record. A 730 evaluation to be completed on Douglas Anderson by Dr. Suitor. Visits are to be every Sunday; monitored.

THIS CASE SET FOR HEARING ON re: Visitation

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:
1. Drug test results in confidential envelope.

RECOMMENDATION
Court's discretion

(cbr)

Rancho Cucamonga District
CIVCAL4 Rancho District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: GARRS700070

CASE NAME: SAMANTHA ANDERSON

SEE ALSO 1 AND COMPANION FILE PROPS0700743 E1 PAGE 7.
COMPANION FILE=PROPS0700743

HEARING:
Petition for Appointment of Guardian

COUNSEL:
GRACE BLACKMON (PET)...JAMES B CHURCH
SAMANTHA ANDERSON (MIN)...ELIZABETH MCDONOUGH
DOUGLAS ANDERSON (RES)...GREGORY T ANNIGAN

GENERAL INFORMATION:

Temporary orders granted on 8/17/07 (with \$20,000 bond requirement)
Continued from **9/17/07 and 10/22/07**. Court refers parties to Family Court Services for mediation re visitation. Court notes that \$20,000 bond is to be filed.
Continued from 12/20/07 at request of counsel for Judge Welch to hear the matter.

THIS CASE IS SET FOR HEARING ON Petition for Guardianship, person and estate, filed by maternal grandmother, minor 1

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Temporary letters issued on 8/17/07, however, no bond is posted. Order Appointing Temporary Guardian is filed with "bond is not required". Does court wish to revisit temporary orders and letters? JTD
2. Mother is deceased.
3. Father was personally served on 8/14/07
4. Petitioner alleges current value of guardianship is \$0.00. However, minor is sole beneficiary of mother's estate (\$1m). Court ordered minimum bond of \$20,000 to be filed and advised petitioner to notify the court within 72 hours when minimum bond is insufficient.
5. Need Family Court Services report re visitation recommendation.

RECOMMENDATION:

Court discretion. If approved, set hearing for filing of inventory and appraisal for **12/15/08** for the filing of the Inventory & Appraisal per Pr.C.§2610; proof of service of Inventory & Appraisal to include Instructions for Objection per Pr.C.§2610. Set hearing re Accounting Review for **7/20/09**. Any accounting to be filed 30 days in advance.

Also need Family Court Services report re visitation recommendation.

(/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0600015

CASE NAME: ESTATE OF LAURIE A CARDENAS

HEARING:
Accounting Review

COUNSEL:
BRANDYL A KIRBY (PET)...WILLIAM F TURNER
LAURIE A CARDENAS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 11/27/07, \$125,000 bond.
2. No accounting or status of administration filed.

RECOMMENDATION:
Inquire status.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0600287

CASE NAME: ROBERT F CARTWRIGHT

SEE ALSO 5

HEARING:
Hearing re: Inventory and appraisal

COUNSEL:
ANDREA L CARTWRIGHT (PET)...THERESA REAGAN-BLOOD
ROBERT F CARTWRIGHT (DEC)...

GENERAL INFORMATION:

Continued from 9/10/07 at request of counsel to file an I&A and status report.

THIS CASE IS SET FOR HEARING ON Inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters testamentary issued, 3/5/07, no bond.
2. Partial I&A filed. However, the I&A is not signed by the personal representative.
Need corrected I&A in accord with Pr.C.§8852.
3. Need Final I&A.

RECOMMENDATION

Need to clear notes. When an inventory and appraisal is not filed as ordered, the court may set hearing in accord with Pr. C. §§ 8804 and/or 8505.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0600287

CASE NAME: ROBERT F CARTWRIGHT

SEE ALSO 4

HEARING:
Accounting Review

COUNSEL:
ANDREA L CARTWRIGHT (PET)...THERESA REAGAN-BLOOD
ROBERT F CARTWRIGHT (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters testamentary issued, 3/5/07, no bond.
2. There was notice of hearing file. However, the notice does not comply with Pr. C. § 12201(b)
3. Petitioner states that the estate has not liquid assets for distribution. However, petitioner states that there are significant creditor's claims that must be addressed. However, this is a no asset estate.

RECOMMENDATION:

Need proper notice. Petitioner appears to be alleging that this is a no asset estate and is requesting that Court determine that no claims need to be paid. Further that 1 yr statute of limitations (CCP §366.2) has expired and no further claims may be filed. If this is a no asset estate then it would appear that a Pr. C. § 12251 petition should be filed and dismissal of claims handled in that hearing.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700559

CASE NAME: DORIS I WADE

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

CHARLES CRHA	(PET)...PATRICK J. SILVA
DORIS I WADE	(DEC)...

GENERAL INFORMATION:

Continued from 1/24/08 at request of counsel. Nothing new filed.

Continued from 4/7/08. Counsel states his client has not been cooperating to get the necessary paperwork to file an I&A. Court orders Charles Crha to personally be present at next hearing; counsel to notify Mr.Crha. Nothing new filed on Inventory and Appraisal matter.

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters Testamentary issued 7/24/07 (full authority, no bond)
2. No inventory is filed (overdue by 3 months)

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. § 2614.5 and/or 8505.

(gls/kra)

FUTURE HEARING DATES:05/28/08 Motion to be relieved.

9/25/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700743

CASE NAME: LILLIAN WHANG

SEE ALSO COMPANION FILE GARRS700070 E1 PAGES 1 & 2.
COMPANION FILE= GARRS700070

HEARING:
Hearing re: Inventory and appraisal

COUNSEL:
GRACE H BLACKMON (PET)...DIANE E ROBBINS
LILLIAN WHANG (DEC)...
DOUG ANDERSON (TP)...GREGORY T ANNIGAN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 9/10/07, \$510,000 bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.
(kra).

FUTURE HEARING DATES:
11/17/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700777

CASE NAME: SALLY MCDONOUGH

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

LISA D CLARK (PET)...LAW OFFICES OF DONEL & ASSOCIA
SALLY MCDONOUGH (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters testamentary issued 10/30/07, no bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.
(kra).

FUTURE HEARING DATES:

1/05/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0700907

CASE NAME: FLORENCE E. GRIFFIN

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

VIRGINIA D LAPRISE (PET)...JO ANN MCDOLE
FLORENCE E GRIFFIN (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters testamentary issued 10/29/07, no bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.
(kra).

FUTURE HEARING DATES:

1/05/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800299

CASE NAME: ROBBIE D. VENABLE

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

MERLE S. VENABLE (PET)...TIMOTHY J BERESKY
ROBBIE D. VENABLE (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by brother

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need original proof of publication.
2. Need notice of Petition to Administer Estate and proof of service
3. Petitioner requests bond of \$102,286. Appears adequate.
4. Petitioner (brother) requests court appoint Paul Lundgrin (nephew) as administrator. Paul Lundgrin signed consent to serve.
5. Need Duties and Liabilities of Personal Representative filed.

RECOMMENDATION:

RFA subject to notes 1-2 & 5, \$102,286 bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800301

CASE NAME: JERRY G. KINKADE

HEARING:
Petition for Letters of Admin. W/ Full Authority under IAEA.

	COUNSEL:
RUBY KINKADE	(PET)...M. LYNN HUSTON
JERRY G. KINKADE	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner requests bond of \$262,000. Appears adequate.

RECOMMENDATION:

Recommend for approval absent objections, \$262,000 bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800305

CASE NAME: MARGARET J. FULLERTON

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

ROBERT V FULLERTON (PET)...FULLERTON LEMANN SCHAEFFER & D
MARGARET J FULLERTON (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by surviving spouse

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner requests bond of \$200,000. Appears adequate.

RECOMMENDATION:

Recommend for approval absent objections 1, \$200,000 bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: PROPS0800307

CASE NAME: GENEVA HAWES

HEARING:
Petition for Letters of Admin. W/ Full Authority under IAEA.

	COUNSEL:
PHIL HAWES	(PET)...PRO/PER
GENEVA HAWES	(DEC)...

GENERAL INFORMATION
Ex-parte orders denied 4/7/08

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. All heirs waive bond and notice.

RECOMMENDATION:
RFA subject to note 1, no bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: RPRRS03063

CASE NAME: Estate of Robert Goltermann

HEARING:
Hearing Re: ACCOUNTING REVIEW.

COUNSEL:
KIRK ALAN GOLTERMANN (PET)...PRO/PER
ROBERT PAUL GOLTERMANN (DEC)...

GENERAL INFORMATION

Letters testamentary issued 2/13/07

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner has filed a summary of account and schedules showing receipts, disbursements and property on hand. However, there is no report attached containing allegations as to accounting period covered, creditors, notice to Dept of Health Services, tax status, nature of the property, etc as required. If this is a final account, need proposed distribution. Also, the summary of account is not in the prescribed format per Pr.C.§1061. It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with the Probate Code, California Rules of Court and Local Rules.
2. Need notice of hearing and proof of service.

RECOMMENDATION:

Need proper accounting.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS05833

CASE NAME: ISRAEL BALLER

HEARING:
Accounting Review

COUNSEL:
DIANE D. HARKISON (PET)...M DANIEL SAYLOR
ISRAEL BALLER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of Administration issued 5/6/04, \$845,000 bond.
2. Status reports of administration were approved on 10/6/06 and 5/21/07.
Petitioner was last entertaining an offer for the sale of the remaining 26 lots.
3. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.
Clerk to notice bonding company.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06482

CASE NAME: EST OF CONSUELO RINCON MARTINEZ

HEARING:
Hearing re Final Discharge

COUNSEL:
NATALIA LOPEZ (PET)...HARTNELL LISTER & MOORE
CONSUELO RINCON MARTINEZ (DEC)...
EDWARD R MARTINEZ (TP)...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final distribution approved 5/7/07.
2. No receipts filed. Need receipts.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505. There is no bonding company to notice (kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06683

CASE NAME: EST OF HELEN L ISGRIG

SEE ALSO 18 & 19

HEARING:

Petition for DETERMINE INTEREST IN ESTATE

COUNSEL:

STEVEN W MANN
HELEN L ISGRIG

(PET)...GUAY P WILSON
(DEC)...

GENERAL INFORMATION

On 1/27/06 court admitted decedent's will and Letters were issued.

On 6/20/06 court admitted codicil to the will.

Continued from **12/4/06** and **1/25/07** and **6/4/07** at request of counsel. Nothing new filed.

Continued from **7/23/07** at request of counsel. Nothing new filed.

Continued from **9/24/07** for Attorney Arnold to be present. Nothing new filed.

Continued from **11/19/07** at request of counsel to be heard with accounting. However, no accounting is filed.

Continued from 3/17/08 at request of counsel.

THIS CASE IS SET FOR HEARING ON Petition to determine interest in estate

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner requests court determination re interest in personal property bequeathed in the codicil.
2. Need P&As re what language in the codicil is being disputed or the specific bequeath that is being disputed. (Issue appears to be that the will left all household furnishings, personal effects, etc. to one person yet codicil allowed neighbor to select certain items – parties cannot agree which items can be taken by neighbor. Issue needs to be framed more specifically if court is to make any determination, such as the specific language in the codicil at issue, the property available and in dispute, etc.).

RECOMMENDATION: Need to clear notes.

(/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06683

CASE NAME: EST OF HELEN L ISGRIG

VACATED- ACCOUNTING FILED AND SET THIS DATE.

SEE ALSO 17 & 19

HEARING:
Accounting Review

STEVEN W MANN	COUNSEL:
HELEN L ISGRIG	(PET)...GUAY P WILSON
	(DEC)...

See notes on prior and following pages.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06683

CASE NAME: EST OF HELEN L ISGRIG

SEE ALSO 17 & 18

HEARING:

SECOND AND FINAL Account and Report of STEVEN W MANN and
Petition for allowance of fees filed.

COUNSEL:

STEVEN W MANN (PET)...GUAY P WILSON
HELEN L ISGRIG (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2nd & final account and petition for fees and final
distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Graduated filing fee schedule filed showing a corrected filing fee of \$110 is due. However, no further filing fee is due.
2. Petitioner and attorney request statutory fees of \$16,419.00 less \$13,000 which was approved by the court and paid leaving a balance of \$3,419.00 requested.
3. Need copies of bank statements verifying balance of property on hand per local rule 20-908.
4. Need copies of escrow closing statement per local rule 20-910.
5. Need receipts for court authorized preliminary distributions to petitioner and to Steven Mann in trust for Jeffrey Mann.
6. Estimated schedule of distribution (exhibit c) does not include the designated gift to the great-grandson, Mason Mann, in the amount of \$50,000 to be held in trust with petitioner as the trustee. Need a corrected proposed distribution schedule.
7. Estimated schedule of distribution (exhibit c) indicates a specific gift to petitioner in the amount of \$18,000.00. Question the authority of these distributions. Need verified supplement.

8. Petitioner alleges the estate is now in a condition to be closed. However, the distribution of the personal property has yet to be resolved. (See notes on prior page, matter #17).

RECOMMENDATION:

Need to clear notes.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06823

CASE NAME: EST OF GARTH B HUFFAKER

SEE ALSO 21

HEARING:
Hearing re: Inventory and appraisal

COUNSEL:
GARTH S HUFFAKER (PET)...GUAY P WILSON
GARTH B HUFFAKER (DEC)...

GENERAL INFORMATION

Continued from **9-29-06, 12/14/06 and 2/15/07** at request of counsel. Nothing new filed.

Continued from **5/3/07** Counsel states the appraisal is difficult and the probate referee is still working on it. Nothing new filed.

Continued from **7/12/07** at request of counsel. I&A still with probate referee.

Continued from **8/15/07 and 9/26/07** at request of counsel. Nothing new filed.

Continued from 11/14/07 and 1/14/07 and 3/17/08 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON filing of inventory and appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters Testamentary issued **3/6/06** (limited authority, no bond).
2. The inventory and appraisal has not been filed.

RECOMMENDATION:

Court may wish to request a declaration of status from the probate referee.

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8505.

(/KRA/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06823

CASE NAME: EST OF GARTH B HUFFAKER

SEE ALSO 20

HEARING:
Accounting Review

COUNSEL:
GARTH S HUFFAKER (PET)...GUAY P WILSON
GARTH B HUFFAKER (DEC)...

GENERAL INFORMATION:

Continued from **5/3/07** to be heard with I&A. Nothing new filed.

Continued from **8/15/07 and 9/26/07** at request of counsel. Nothing new filed.

Continued from 11/14/07 and 1/14/08 and 3/17/08 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters with Limited authority granted **3/8/06**, no bond.
2. No accounting or report of status of administration filed.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.
(/kra/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS06907

CASE NAME: ESTATE OF RUTH A BROWN

HEARING:
Accounting Review

	COUNSEL:
CAROL HAYES	(PET)...HERITAGE LAW OFFICES
RUTH A. BROWN	(DEC)...
HELEN BROWN	(TP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:

Continued from 2/11/08 and 4/7/08 at request of counsel.

THIS CASE IS SET FOR HEARING ON Second report of Status of Administration

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Special Administration granted 2/14/06 and probate petition granted 3/30/06, no bond required.
2. Petition for preliminary distribution and partial fees granted 7/30/07 and this hearing is confirmed.
3. Need notice of hearing and proof of service according to Pr. C. §12201 (b)
4. Petitioner states that the estate is waiting for the Estate of Steven Brown to close in order receive the assets into this estate. Petitioner requests an additional year to close the estate.

RECOMMENDATION:

Need notice. If notice is satisfied, set Accounting Review for 05/18/09.
(kra/cbr).

FUTURE HEARING DATES:

6/12/08 Probate status report filed.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS07145

CASE NAME: MTR OF TRINIDAD GWINNER

HEARING:
Accounting Review

COUNSEL:
JOHNNY ORLANDO CHAVEZ (PET)...MICHAEL SACKS
TRINIDAD GWINNER (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Status report has been filed and is scheduled for hearing on 6-5-08.

RECOMMENDATION:
This matter may go off calendar.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 9:00 DEPT: E1

CASE #: SPRSS56073

CASE NAME: IN THE ESTATE OF ANTONIO SAMBRANO

HEARING:
Accounting Review

COUNSEL:

ANTONIO SAMBRANO (DEC)...
IRENE S FOSTER (PET)...BRUNICK BATTERSBY MCELHANEY &
GUADALUPE GB SAMBRANO (OBJ)...PRO/PER
PATRICIA B. VILLALOBOS ()...

GENERAL INFORMATION:

1st Accounting was approved 10/26/05

Continued from 11/1/07. Ms. Villabos stated a complaint against petitioner and counsel for not sharing with her information or giving her notice of continuances. Court states there will be no more telephonic continuances unless all parties are notices (including Patricia Villabos, daughter).

Continued from 12/20/07 at request of Counsel. Nothing new filed.

Continued from 2/25/08 at request of petitioner: awaiting tax documents. Court instructs Kyle Patrick to remind Rene Abraham that Patricia Villalobos would like to speak to her regarding some distributions that were made and some accounting issues.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. 2nd & Final Accounting is due.
2. No accounting and/or status report is filed.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. § 11050 et seq. There is no bonding company to notice (/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

PUBLIC GUARDIAN

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: CONPS0600064

CASE NAME: MTR OF ROBERT GREDING

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ROBERT GREDING	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 12/29/06 – 1/23/08.
2. Assets on hand \$7,673.50 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$1,000.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 1/24/08 – 1/23/09. Any accounting to be filed 30 days in advance. (kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: CONPS0700051

CASE NAME: CLARENCE DYAS

HEARING:

FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
CLARENCE DYAS	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 3/23/07 – 1/29/08.
2. Conservatee died 8/25/07
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive fees.
6. Petitioner requests discharge in the report of conservator. As there are no assets remaining in the estate, no receipts will be required. However, discharge is not permitted until after an Ex-parte petition for final discharge is submitted.
7. Order returned for correction on 4/23/08. **New order submitted and also appears defective; cannot discharge pleading format. Need to file a separate exparte final discharge and order.**

RECOMMENDATION:

If approved court to set hearing re filing final discharge for **5/18/09**
(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SC SS01170

CASE NAME: IN THE MATTER OF CORRINE JOHNSON

HEARING:
Hearing re Final Discharge

COUNSEL:
CORRINE JOHNSON (CEP)...NANCY J YOUNG
PUBLIC GUARDIAN (SC)...COUNTY COUNSEL

GENERAL INFORMATION:

Continued from 4/7/08 at request of counsel to file receipts and final discharge order. Nothing new filed.

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 4/2/07.
2. Need receipt from Dept of Health Services.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02996

CASE NAME: MTR RE SEAN COOPER

HEARING:
Petition to establish irrevocable burial trust

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
SEAN COOPER (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON petition to establish an irrevocable burial trust.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Conservatee is on Social Security Disability and cannot have more than \$2,000 in liquid assets. Assets currently exceed that amount. Petitioner therefore requests that an irrevocable burial trust be created by diverting assets in excess of the \$2,000 as they become available.
2. Petition appears procedurally complete.

RECOMMENDATION:
Court's discretion.

FUTURE HEARING DATES:
5/04/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SC SS03078

CASE NAME: MTR OF ALLEN LANHAM

HEARING:
Hearing Re: Report of counsel.

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ALLEN LANHAM	(CEP)...JUDITH RUNYON

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Report of Counsel

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set at the time set for hearing re 1st account on 12/3/07. Court approved the first accounting and order signed. Minute order notes that Judith Runyon to interview client re: Court Investigator report.
2. Need report of counsel.

RECOMMENDATION:
None.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SC SS329

CASE NAME: IN THE MATTER OF HERBERT DONNAN

HEARING:
Hearing re Final Discharge

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
HERBERT DONNAN	(CEP)...

GENERAL INFORMATION:

**Continued from 4/7/08 at request of counsel to file receipts and discharge order.
Nothing new filed.**

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 4/2/07.
2. Need receipt from Dept of Health Services.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.

(kra)

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SG SS7014

CASE NAME: IN MTTR OF STEPHEN SIMS

SEE ALSO 31

HEARING:
Hearing Re: Appointment of Public Guardian.

COUNSEL:
EDNA MAXWELL (CPE)...PRO/PER
STEPHEN WILLIAM SIMMS (CEP)...

GENERAL INFORMATION:

Continued from 1/31/08 for PG to contact IPC re physical/emotional issues. Court is informed that Ms Maxwell is deceased as of 11/2007 and that proposed conservatee was living temporarily with Ms. Maxwell's son in Hemet (and is living without funds as accounts are under conservatorship).

Continued from 3/6/08. PG is appointed temporary conservator. PG will file for successor conservatorship.

THIS CASE IS SET FOR HEARING ON Appointment of Public Guardian

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. There are no moving documents in the file.
2. Inland Valley Regional Center report in confidential envelope.

RECOMMENDATION:

Need moving papers.
(gls/kra/cbr)

FUTURE HEARING DATES:

2/05/09 Accounting Review

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SG SS7014

CASE NAME: IN MTTR OF STEPHEN SIMS

SEE ALSO 30

HEARING:
Accounting Review

COUNSEL:
EDNA MAXWELL (CPE)...PRO/PER
STEPHEN WILLIAM SIMMS (CEP)...

GENERAL INFORMATION:
Continued from 3/6/08 at request of counsel.

THIS CASE IS SET FOR HEARING ON accounting review of Edna Maxwell

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Waiver of account approved 2/8/07 re accounting period thru 12/8/06.
2. On 1/31/08 Court was informed that the conservator died in November 2007 and set this accounting review. As conservator was a self-represented litigant, Court may wish to trail this matter with the appointment of a successor and require the successor conservator to prepare and file a final accounting. (See notes on prior page.)
3. No accounting filed. Need final account

RECOMMENDATION:
Court's discretion.
(kra).

FUTURE HEARING DATES:
2/05/09 Accounting Review

Superior Court of Calif, County of San Bernardino

Page: 32

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS00178

CASE NAME: IN THE MATTER OF BARBARA STROHM

HEARING:

SECOND AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

BARBARA STROHM (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2nd & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 10/16/06 – 1/10/08.
2. Conservatorship established under W&I 5350 and terminated on 10/14/07
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel request fees of \$2,596.00 each. As the estate contains no assets on hand, question how petitioner proposes payment of fees. Need verified supplement.
6. Petitioner alleges that petitioner distributed conservatee's 1/2 interest in real property to PG's new temporary conservatorship case of 1/11/08.

RECOMMENDATION:

If approved court to set hearing re filing receipts and final discharge for **5/18/09**
(kra)

FUTURE HEARING DATES:

5/30/08 Hearing Re: NON-APPEARANCE PLACEMENT REVIEW. WB

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS01467

CASE NAME: MATTER OF THOMAS ZAREMBA

VACATED- ACCOUNTING FILED AND IS SET FOR 5/19/08.

HEARING:
Accounting Review

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
THOMAS ZAREMBA	(CEP)...HARTNELL HORSPOOL & FOX

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS01568

CASE NAME: MATTER OF RITA CARPENTER

HEARING:

THIRD Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
RITA CARPENTER	(CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 7/12/06 – 1/30/08.
2. Assets on hand \$1,926.52 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$35.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 1/31/08 – 1/30/09. Any accounting to be filed 30 days in advance. (kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02209

CASE NAME: MTR OF LAUREANN BEALL

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

LAUREANN BEALL	(CEP)...HARTNELL HORSPOOL & FOX
CHARLOTTE L FORD	(CPE)...PRO/PER
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/5/06 – 11/02/07.
2. Assets on hand \$817.36 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$204.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 11/3/07 – 11/2/08. Any accounting to be filed 30 days in advance. (kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02365

CASE NAME: MTR OF MARY HELEN GUTIERREZ

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARY HELEN GUTIERREZ (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

Letters are to expire on 4/4/08.

THIS CASE IS SET FOR HEARING ON 4th account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 7/26/06 – 1/30/08.
2. Assets on hand \$468.74 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$117.00 each.
5. Last psychologist report in the file is dated 2/28/07. Court may wish to inquire as to the status of the next annual report.
6. Annual termination order signed by the judge on 04/15/08.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 1/31/08 – 1/30/09. Any accounting to be filed 30 days in advance. (kra/cbr).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02426

CASE NAME: MTR OF JOSEPH SWIFT

HEARING:
FOURTH AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
JOSEPH SWIFT (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 6/8/06 – 12/10/07.
2. Conservatee died 2/17/07.
3. Assets on hand \$639.15 consisting of cash.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian requests fees of \$319.57.
6. County Counsel requests fees of \$319.58.
7. No funds will remain in the estate for distribution after payment of fees.

RECOMMENDATION:

If approved court to set hearing re final discharge for **5/18/09**
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02468

CASE NAME: MTTR OF LASAAD BRUMFIELD

HEARING:

FOURTH AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
LASAAD BRUMFIELD (CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 6/6/07 – 2/26/08.
2. Conservatorship established under W&I 5350 and terminated on 12/28/07.
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive compensation.

RECOMMENDATION:

If approved court to set hearing re final discharge for **5/18/09**

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02526

CASE NAME: MTR OF PAMELA WHALEN

HEARING:
Accounting Review

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
PAMELA WHALEN	(CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 7/9/07 court approved the 3rd account; 4th accounting now due covering the period 3/7/07 – 3/6/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02845

CASE NAME: MTR RE WILLIAM M WILKES

HEARING:

FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and Petition for fees

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
WILLIAM M WILKES	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 3/25/05 – 1/29/08 (2 years 10 months).
2. Conservatee died 1/1/07 (15 months ago). The final accounting shall be filed within 120 days after conservatee's death unless good cause for the delay is shown per Local rule 20-1410. Need verified supplement.
3. Assets on hand \$2,500.00 consisting of cash.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Petitioner has distributed \$21,321.88 to the Public Administrator on behalf of the estate of William Willkes representing the final distribution of conservatee's estate. As this action was not approved by the court, need verified supplement setting forth the authority to take such action. Also, it does not appear that a probate proceeding has been filed and thus no letters issued. Question the PA's authority to accept the estate funds. Need verified supplement.
6. Public Guardian and County Counsel request fees of \$1,250.00 each.

RECOMMENDATION:

Need to clear notes. If approved court to set hearing re filing receipts and final discharge for **5/18/09**

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS02971

CASE NAME: MTR RE CARMEN LOPEZ

HEARING:
Accounting Review

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
CARMEN LOPEZ	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:

Continued from 2/11/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 4/30/07 court approved the 1st account; 2nd accounting now due covering the period of 11/1/06 – 10/31/07.
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS03006

CASE NAME: MTR RE DOMINIC PIAZZA

HEARING:

FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
DOMINIC PIAZZA (CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 11/18/05 – 7/25/07.
2. Conservatorship established under W&I 5350 and terminated on 12/29/06.
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive compensation.

RECOMMENDATION:

If approved court to set hearing re final discharge for **5/18/09**

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS2660

CASE NAME: MTR OF ANTONIA SAENZ

HEARING:

Petition for ORDER THAT CONSERVATOR NEED NOT PRESENT SIXTH
ANNUAL ACCT

COUNSEL:

PUBLIC GUARDIAN
ANTONIA SAENZ

(CPE)...COUNTY COUNSEL
(CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of account (Pr.C.§2628)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 10/20/06 – 3/13/08.
2. Public Guardian petitions for waiver of accounting as a matter of law per Pr.C.§2628 on basis assets are less than \$7,500 and income was less than \$1,000 exclusive of public benefits.
3. No oppositions filed at the time of review of this file.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 3/14/08 – 3/13/09. Any accounting to be filed 30 days in advance.
(kra)

FUTURE HEARING DATES:

5/19/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS4017

CASE NAME: IN THE MATTER OF ALBERT DUSTIN

HEARING:

THIRD AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ALBERT DUSTIN	(CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 3rd & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 7/3/07 – 12/14/07.
2. Conservatorship established under W&I 5350 and terminated on 10/14/07. A conservatorship was granted on 10/30/07.
3. Zero assets on hand.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Public Guardian and County Counsel waive compensation.

RECOMMENDATION:

If approved court to set hearing re final discharge for **5/18/09**
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS8150

CASE NAME: MTR OF MARTIN ROMAN

VACATED- ACCOUNTING FILED AND SET THIS DATE.

SEE ALSO 46 & 46A

HEARING:
Accounting Review

	COUNSEL:
MARTIN ROMAN	(CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

See notes on following page (matter #46).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS8150

CASE NAME: MTR OF MARTIN ROMAN

SEE ALSO 45 & 46A

HEARING:

FOURTH & FINAL Account and Report of PUBLIC GUARDIAN and Petition for fees

COUNSEL:

MARTIN ROMAN	(CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 4th & Final account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner has filed 2 accountings (a 4th & final and a 1st & current). The accounting periods overlap whereby the 4th & final account includes the period covered in the 1st & current account. Petitioner alleges that the 4th account is final because the Conservatorship established under W&I 5350 was terminated on 7/23/06 and that the conservatorship was not re-established until 8/18/06 (which is now in effect). As it appears the accounts have been combined in the 4th account, Court may wish to deem this 4th account current.
2. Accounting period covers 1/27/05 – 12/11/07.
3. Assets on hand \$1,054.00 consisting of cash.
4. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
5. Disbursements show a "final distribution" made to PG on 12/11/07 in the amount of \$1,052.76. As the conservatorship was last re-established on 9/22/07 and expires on 9/22/08, question the purpose of this distribution.
6. Public Guardian and County Counsel request fees of \$527.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 12/12/07 – 12/11/08. Any accounting to be filed 30 days in advance.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS8150

CASE NAME: MTR OF MARTIN ROMAN

SEE ALSO 45 & 46

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for
allowance of fees filed.

COUNSEL:

MARTIN ROMAN (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

See notes on prior page (matter #46).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS8717

CASE NAME: IN THE MTTR OF HUEY HARVEY

HEARING:
Accounting Review

	COUNSEL:
HUEY HARVEY	(PLA)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter is set for accounting review. No accounting has been filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr. C. § 2620.2. There is no bonding company to notice.

NMT

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS8971

CASE NAME: IN THE MATTER OF GLORIA REYES

HEARING:

first Account and Report of PUBLIC GUARDIAN and Petition for
allowance of fees filed.

COUNSEL:

GLORIA REYES (CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Conservatorship re-established 8/18/07.

THIS CASE IS SET FOR HEARING ON 1st account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 7/21/06 – 8/27/07.
2. Assets on hand \$1,766.57 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$442.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 8/28/07 – 8/27/08. Any accounting to be filed 30 days in advance. (kra).

FUTURE HEARING DATES:

6/23/08 Hearing re Final Discharge.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: SLCSS9485

CASE NAME: IN THE MATTER OF MONICA CROCKER

HEARING:

second Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

MONICA CROCKER	(CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 2nd account current and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 11/22/05 – 11/29/07 (2 years).
2. Assets on hand \$343.10 consisting of cash.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel request fees of \$69.00 each.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review for **5/18/09**. Accounting to cover the period of 11/30/07 – 11/29/08. Any accounting to be filed 30 days in advance. (kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:00 DEPT: E1

CASE #: VC VS00143

CASE NAME: MTR OF NICHOLAS JOSEPH HARRY SMITH

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for fees

COUNSEL:

NOREEN SMITH (PET)...
NICHOLAS JOSEPH SMITH (CEP)...
ELENA ARMSTRONG (CEP)...PRO/PER
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
INLAND REGIONAL CENTER (OBJ)...J.S. HERMANSON

GENERAL INFORMATION

PG appointed successor trustee of the SNT 2/17/06

THIS CASE IS SET FOR HEARING ON 1st account current of successor trustee of SNT and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 2/17/06 – 4/14/07.
2. Assets on hand \$20,218.45 consisting of cash and pre-need burial trusts.
3. Summary of Account is not on the mandatory Judicial Council form (GC-400/405). Court may wish to direct petitioner to use such form for future accountings. JTD
4. Public Guardian and County Counsel waives compensation.

RECOMMENDATION:

If approved court to set next hearing re Accounting Review of SNT for **5/18/09**. Accounting to cover the period of 4/15/07 – 4/14/08. Any accounting to be filed 30 days in advance. (kra).

FUTURE HEARING DATES:

11/24/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

CONSERVATORSHIP

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700231

CASE NAME: MTR OF KENNETH K G EUGENIO JR

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR
CONSERVATORSHIP of KENNETH EUGENIO

COUNSEL:

KENNETH EUGENIO (PET)...JOSEPH P FOLEY
CAMILLE EUGENIO (CP)...JOSEPH P FOLEY
KENNETH K G EUGENIO JR (CTP)...EDWARD B FISCHER

GENERAL INFORMATION

Conservator of the Person Only appointed 11/26/07.

Continued from 4-7-08. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Compliance review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Per Pr.C.§2352.5 re care plan is not applicable to a conservatee with developmental disabilities and receiving services from the IRC.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).

RECOMMENDATION:

Inquire status.
(KRA/NMT).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0700303

CASE NAME: MTR OF JUSTIN SPENCER THOMPSON

HEARING:
Petition for Appointment of Conservator

COUNSEL:

JEAN THOMPSON (CP)...LENITA A SKORETZ
KEITH THOMPSON (CP)...LENITA A SKORETZ
JUSTIN SPENCER THOMPSON (CTP)...WALTER T. MOORE

GENERAL INFORMATION

Ex-parte hearing 1/8/08 court appoints counsel for conservatee and refers matter to Court Investigator. At Ex-parte hearing 1/15/08 court grants temporary conservatorship.

Continued from 2/11/08 at request of counsel to file petition for general conservatorship.

THIS CASE IS SET FOR HEARING ON petition for Limited Conservatorship, person only, by parents

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. No bond – person only.
2. Proposed conservatee is developmentally disabled. Court appointed Attorney Moore for conservatee.
3. Petitioner requests limited conservatorship powers under Pr.C.§2351.5 specifically the right to make decisions as to conservatees choice of residence, access to confidential records, consent to marriage, to contract and decisions concerning education.
4. Petitioner seeks orders limiting conservatee's civil and legal rights to choose a residence, access confidential records, consent to marriage, contract and make decisions concerning education.
5. Medical powers sought. Capacity declaration filed. However, does **not** support request. Court to review.

6. Need return of citation. Medical declaration indicates conservatee is able to attend. Need attendance by conservatee. **Citation returned served. However, the citation fails to indicate that a Limited Conservatorship is sought and thus conflicts with the petition for appointment served with the citation. Also, the notice is deficient in that only a 7 day notice was given and a 15 day notice is required. Need proper citation and proof of service.**
7. Need Court Investigator report
8. Inland Regional Center report in confidential envelope.
9. Need report of court appointed counsel.
10. **Notice of hearing filed as to a petition for general conservatorship; however, no new petition is found in the file.**

RECOMMENDATION:

Need to clear notes.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: CONPS0800058

CASE NAME: In re Matter of Gloria Feaster

HEARING:
Petition for AUTHORIZATION TO CREATE A SPECIAL NEEDS TRUST

COUNSEL:
CHRISTINA ERICKSON-TAUBE (PCR)...HORSPOOL & PARKER
GLORIA FEASTER (PCE)...LENITA A SKORETZ

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON creation of a special needs trust.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. The petitioner is the temporary Conservator of the person and estate of the Conservatee. The Conservatee is to receive a litigation settlement from a wrongful death action involving the death of her son. After payment of costs and attorney fees the Conservatee is to receive \$200,000. The Conservatee suffered a stroke and is not able to care for her herself or handle her finances. Conservatee relies on Medi-Cal for her medical treatment. Should a Special Needs Trust not be created she will become Medi-Cal ineligible.
2. A Special Needs Trust may be created where:
 - (a) A court approves (1) a compromise of, or the execution of a covenant not to sue on or a covenant not to enforce judgment on, a minor's disputed claim or (2) approves a compromise of a pending action or proceeding to which a minor or incompetent person is a party or (3) gives judgment for a minor or incompetent person.
 - (b) The compromise, covenant, or judgment provides for the payment or delivery of money or other property for the benefit of the minor or incompetent person." (Pr.C. § 3600).
3. The court must make the following findings:
 - (1) That the minor or person with a disability has a disability that substantially impairs the individual's ability to provide for the individual's own care or custody and constitutes a substantial handicap.

(2) That the minor or person with a disability is likely to have special needs that will not be met without the trust.

(3) That money to be paid to the trust does not exceed the amount that appears reasonably necessary to meet the special needs of the minor or person with a disability. (Pr.C. § 3604(b)).

4. The trust sets forth the needs that are defined as special needs at the pink tab in the file. Court may wish to review to determine if the defined needs are sufficient.
5. The trust indicates that the trustee has the power to accept additions to the trust without first seeking leave of court. That would appear to defeat the statutory requirement that the court determine that the amount of assets in the trust do not exceed the amount necessary to meet the special needs of the beneficiary.
6. The trust does allow for annual accounting, bond and reimbursement of Department of Health Care Services.
7. Notice appears sufficient.
8. Petitioner indicates that \$200,000 is reasonable, but provides no statement of costs re special needs and no statement re life expectancy other than to list the age and indicate that the beneficiary is likely to outlive the trust. Judge to decide if this is sufficient to allow the court to make a ruling that the money paid into the trust appears to be reasonably necessary to meet the special needs per Pr.C. § 3604(b)(3).
9. The petition indicate that assets will be distributed per intestate succession upon the death of the beneficiary. Does the beneficiary have any current estate planning in place? Would such a distribution interfere with any estate planning in place? If so, this would also have to be considered a substituted judgment and the rules of substituted judgment would apply. File verified supplement.

RECOMMENDATION:

Need verified supplement. Then court's discretion. If granted set bond in the amount of \$200,000. If petition granted court will have to set future dates. Court will have to determine if it want and inventory and appraisal filed if so, set hearing for filing of inventory and appraisal for 12-15-08. Set hearing for accounting review for 7-20-09. Accounting to be filed 30 days in advance.

NMT

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: MC MS00155

CASE NAME: CONSERVATORSHIP OF JAMES K. BURNS

VACATED- CASE TRANSFERRED TO LOS ANGELES COUNTY.

HEARING:
Accounting Review

COUNSEL:
ROBIN A ALM (PET)...
PUBLIC GUARDIAN-CONSERVATOR (AGN)...PRO/PER
COURT INVESTIGATOR- CONSERVATO(AGN)...
ISAAC MYERS (CPE)...PRO/PER
JAMES K BURNS (CEE)...SCOTT SOADY

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01379

CASE NAME: IN THE MATTER OF ALEX NOE LLAMAS

HEARING:
Accounting Review

COUNSEL:
ALEX NOE LLAMAS (CTP)...
MARIA LLAMAS (CP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 10/22/07 court approved the 4th account; 5th accounting now due covering the period 2/10/07 – 2/9/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01659

CASE NAME: MATTR OF JUAN P CERVANTES

SEE ALSO 57

HEARING:
OSC re: Failure to appear

COUNSEL:
PABLO CERVANTES (CPE)...DAVID K GARRETT
JUAN PABLO CERVANTES (CEP)...EDWARD B FISCHER

See notes on next page

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01659

CASE NAME: MATTR OF JUAN P CERVANTES

SEE ALSO 56

HEARING:
Accounting Review

COUNSEL:
PABLO CERVANTES (CPE)...DAVID K GARRETT
JUAN PABLO CERVANTES (CEP)...EDWARD B FISCHEL

GENERAL INFORMATION:

2nd Account is due for the period 1/1/03 – 12/31/04 and

3rd Account is due for the period 1/1/05 – 12/31/06

Continued **many times since 2/25/05.**

On **5/13/05** court set OSC re Sanctions. Citation issued on **10/25/05**

On **1/20/06** court sets OSC re Contempt.

On **5/26/06** court set this OSC re Sanctions.

On **8/11/06** Citation un-served as process server cannot locate conservator.

Continued from **11/2/06 and 12-11-06.** declaration filed by Attorney Garret. The addresses given to counsel are not good and the Conservator cannot be located. Matter continued to allow counsel an additional opportunity to find the Conservator. Court sets Accounting review. OSC not continued.

Continued from **2/8/07.** Court unsuccessfully attempted to serve the conservator in 1/2006. Court notified PG of possible appointment as successor trustee.

Continued from **4/9/07.** PG stats conservator and conservatee cannot be found. Court orders atty David Garrett to prepare second accounting per Pr.C. 2632(c).

Continued from **7/9/07.** Court reappoints attorney Edward Fischel for conservatee. Citation issued to conservator Pablo Cervantes, to be served at both addresses on Confidential Report.

Continued from **8/20/07.** Court relieved PG from further involvement in case, ordered atty Edward Fischel to prepare and file report re conservatee and to be present at next hearing, ordered atty David Garrett and Pablo Cervantes to be present at next hearing.

Continued from **10/15/07** at request of counsel David Garrett. Nothing new filed.

Continued from **12/03/07** Attorney Garrett and conservator Pablo Cervantes failed to appear or notify the court. Court suspends powers of conservator, sets OSC re removal of conservator, sets OSC re Garrett FTA, and issues citation as to David Garrett.

Continued from **1/28/08** at request of counsel as waiver of accounting to be filed. Nothing new filed. Hearings re OSC re FTA and OSC re removal of conservator are taken off calendar as court and counsel confer off record. Nothing new filed.

Continued from 4/7/08. At the 04/07/08 there was no appearance by Mr. Garrett and his client Pablo Cervantes. The court ordered Mr. Garrett and his client Pablo Cervantes to be present at next hearing. Court set OSC re Failure to Appear. Clerk mailed notice. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES ARE NOTED:

1. 2nd account is due for the period 1/1/03 – 12/31/04
2. There was an attempt by the court to serve the Conservator in 1-06 that was not successful.
3. Process server indicates Citation is unable to be served as conservator unable to be located. Citation reissued 7/9/07. Citations returned un-served.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(/kra/cbr).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01797

CASE NAME: MATTER OF DE'WAYNE CORY

SEE ALSO 58A & 58B & 58C

HEARING:
OSC re: Failure to Comply with Court Order

COUNSEL:
BETTY L CORY (CPE)...JAMES B CHURCH
DE'WAYNE CORY (CEP)...JOAN NELMS
MELODIE Z SCOTT (CE)...HORSPOOL & PARKER
HARTFORD INSURANCE CO. (TP)...LASKERO AND ASSOCIATES

GENERAL INFORMATION **Continued from 4-7-08. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON O.S.C. re failure to comply with court order.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Matter originated as an exparte petition to issue an O.S.C. re failure to comply with court orders. Bank of America refused to release assets to Melodie Scott.
2. We have proof of personal service on the bank manager Ignacio Garay.
3. Question if this is the proper person for service. Agent for Service of Process in California is CT Corporation Systems. See Information in file on the left hand side of the file.
4. There is no opposition in the file at the time of this review.
5. Conservator has filed a statement of damages and request for sanctions.

RECOMMENDATION:

Need court's ruling on number 3.

NMT

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01797

CASE NAME: MATTER OF DE'WAYNE CORY

SEE ALSO 58 & 58B & 58C

HEARING:
Hearing Re: STATUS OF CONSERVATORSHIP.

COUNSEL:
BETTY L CORY (CPE)...JAMES B CHURCH
DE'WAYNE CORY (CEP)...JOAN NELMS
MELODIE Z SCOTT (CE)...HORSPOOL & PARKER
HARTFORD INSURANCE CO. (TP)...LASKERO AND ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON status of conservatorship.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. This matter was set at the request of Mr. Church. There are no moving papers to review.

RECOMMENDATION:
Court's discretion.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01797

CASE NAME: MATTER OF DE'WAYNE CORY

SEE ALSO 58 & 58A & 58C

HEARING:

Hearing Re: STATUS OF REMOVAL OF CONSERVATOR/TRUSTEE.

COUNSEL:

BETTY L CORY	(CPE)...	JAMES B CHURCH
DE'WAYNE CORY	(CEP)...	JOAN NELMS
MELODIE Z SCOTT	(CE)...	HORSPOOL & PARKER
HARTFORD INSURANCE CO.	(TP)...	LASKERO AND ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON status of conservatorship.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. This matter was set at the request of Mr. Church. There are no moving papers to review.

RECOMMENDATION:

Court's discretion.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS01797

CASE NAME: MATTER OF DE'WAYNE CORY

SEE ALSO 58 & 58A & 58B

HEARING:
Hearing Re: STATUS OF BOND.

COUNSEL:
BETTY L CORY (CPE)...JAMES B CHURCH
DE'WAYNE CORY (CEP)...JOAN NELMS
MELODIE Z SCOTT (CE)...HORSPOOL & PARKER
HARTFORD INSURANCE CO. (TP)...LASKERO AND ASSOCIATES

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON status of conservatorship.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. This matter was set at the request of Mr. Church. There are no moving papers to review.
2. Review of the file shows that a surety rider has been filed on behalf of Ms. Scott. See green marked tab.

RECOMMENDATION:
Court's discretion.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02790

CASE NAME: MTR OF LEROY MYER BRAMAN

SEE ALSO 58E & COMPANION FILE SPRSS06657 E1 PAGES 58F & 58G

HEARING:

Waiver of account and for final distribution.

COUNSEL:

TODD A BRAMAN (CPE)...A. MERLE SESSIONS
LEROY MYER BRAMAN (CEP)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON waiver of accounting and for final distribution.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. There is a new supplemental to the waiver of accounting. The document is now verified by the Conservator.
2. Basically, the supplement indicates that the assets do not balance because at the time of the death of the Conservatee a number of the accounts had apparently not been transferred into the conservatorship estate and were "pay on death" accounts.
3. The Conservator is the sole heir of the estate and as such waives an accounting. This would appear to negate the need for concern over any defects in the record.
4. The request for fees by counsel is very confusing. Counsel has included a calculation for statutory fees. There are no statutory fees in conservatorship. It may be that counsel is requesting the statutory fees for the companion probate case and the extra-ordinary fees for the conservatorship services, although that is unclear. If that is the case then counsel is requesting statutory fees of \$23,509. The request for extra-ordinary fees are initially \$1,327 and then by supplement an additional \$3,864. There is also a request in the probate file for \$15,369.50 in extra-ordinary fees. Court may wish to require petitioner to differentiate between the extra-ordinary fees applicable to the conservatorship and probate. Court should also note that some of the charges appear excessive. For example, each time there is an

entry "Telephone Calbensag" the charge is for 3 hours. Each time counsel writes a "letter Stipple" the charge is for 3 hours. Every letter draws a 3 hour charge. See itemization in the probate file at pink tab.

5. All assets are to be turned over to the executor of the probate estate.

RECOMMENDATION:

Judge will have to make a determination on the attorney fees and whether the court wants further explanation on the imbalance in the fees and the bank statements on the inventory and appraisal. If petition granted court will have to set future dates. Set hearing for filing of receipts and discharge for 5-18-09.

COMPANION FILE= SPRSS06657

A-O

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS02790

CASE NAME: MTR OF LEROY MYER BRAMAN

SEE ALSO 58D & COMPANION FILE SPRSS06657 E1 PAGES 58F & 58G

HEARING:
Hearing re: INVENTORY AND APPRAISAL

COUNSEL:
TODD A BRAMAN (CPE)...A. MERLE SESSIONS
LEROY MYER BRAMAN (CEP)...

GENERAL INFORMATION:

Continued from 11/18/05, 3/3/06 & 6/23/06

Continued from 10/13/06 to further evaluate value of real property.

Continued from 6/7/07, 8/8/07 and 10/4/07. On 8/8/08, Court orders conservator to file a statement of assets on hand by 9/6/07.

Continued from 11/29/07 to be heard with waiver of account. No I&A filed.

Continued from 12/20/07. Atty Church is requesting to be relieved.

Continued from 12/27/07 for bank statements that are required for the Inventory and Appraisal and cannot be waived. Nothing new filed.

Continued from 3/3/08 at request of counsel. Mr. Sessions has filed bank statements.

However, the bank statements are not date of creation of the conservatorship values.

They are from 2 months after the creation, assuming the date placed on the front of the inventory and appraisal for beginning of the conservatorship is correct. Mr. Sessions alleges that some of the accounts were CD accounts with maturity dates and indicated that no bank statement was available for the date of the creation of the conservatorship. In such circumstances Local Rules of Court, Rule 20-908 should be employed whereby petitioner obtains a verified statement from a bank officer as to the value of the assts on the date of the creation of the conservatorship.

Continued from 4-21-08 for the review of additional documents. However, the only additional document that Mr. Sessions has filed is a request for additional fees. There are no new documents in relationship to the inventory and appraisal. See discussion on previous page.

THIS CASE IS SET FOR HEARING ON filing Inventory & Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Conservator appointed 4/15/05 with \$124,000 bond.
2. Inventory and Appraisal filed 12/26/07, no bank statements to support bank account balances. Need bank statements.

RECOMMENDATION:

See discussion under waiver of accounting on the probate matter.

(/cbr/KRA/NMT)

COMPANION FILE= SPRSS06657

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SPRSS06657

CASE NAME: ESTATE OF LEROY BRAMAN

SEE ALSO 58G & COMPANION FILE SCSS02790 E1 PAGES 58D & 58E

HEARING:

Waiver of account and for final distribution.

COUNSEL:

TODD BRAMAN	(PET)...	A. MERLE SESSIONS
LEROY BRAMAN	(DEC)...	

COMPANION FILE= SCSS02790

GENERAL INFORMATION See next page.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SPRSS06657

CASE NAME: ESTATE OF LEROY BRAMAN

SEE ALSO 58F & COMPANION FILE SCSS02790 E1 PAGES 58D & 58E

HEARING:
Hearing re: Inventory and appraisal

	COUNSEL:
TODD BRAMAN	(PET)...A. MERLE SESSIONS
LEROY BRAMAN	(DEC)...

GENERAL INFORMATION After conservatorship matter is closed then petitioner will have to file an amended waiver of accounting verified by the petitioner and not by counsel. Petitioner will also have to file a corrected inventory and appraisal showing the assets that are transferred from the conservatorship. Court will also have to differentiate between the probate fees requested and the conservatorship fees requested.

COMPANION FILE= SCSS02790

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 05/12/08 TIME: 10:30 DEPT: E1

CASE #: SC SS03203

CASE NAME: MTR OF DONALD C EABY

HEARING:
Accounting Review

COUNSEL:
ALISON HOFFMAN (PET)...JAMES B CHURCH & ASSOCIATES
DONALD C EABY (CEP)...BRYAN C. HARTNELL

GENERAL INFORMATION:

Continued from 4/7/08 at request of counsel to file an accounting. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Conservator of the person and estate appointed 1/29/07, \$900,000 bond.
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notify bonding company.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

MISC.

DATE: 05/12/08 TIME: 1:30 DEPT: E1

CASE #: SPRSS07192

CASE NAME: ESTATE OF PALESTINE SMITH

OUT FOR READINESS ON 05/08/08.

HEARING:

Court Trial -- Estimated trial length *** hrs.

COUNSEL:

MONICA SMITH (PET)...FRANK PRAINITO

PALESTINE SMITH (DEC)...

LORRAINE VON DEAUXPLETTE (PET)...MICHAEL R YOUNG

SHERRI L KASTILAHN (PET)...PRO/PER

No calendar notes as this is on for Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **PROBATE**

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0600038

CASE NAME: ESTATE OF GERALDINE M CURRY

HEARING:
Hearing Re: REPORT OF STATUS OF ADMINISTRATION.

COUNSEL:
LESLE NOYLES (PET)...FELIX M MARTIN
STEPHENYE NOYLES (PET)...FELIX M MARTIN
GERALDINE M CURRY (DEC)...

GENERAL INFORMATION:
Letters testamentary issued 1/23/07.

THIS CASE IS SET FOR HEARING ON Status report of administration

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner alleges the estate is not in a condition to be closed as the estate's real property has not yet sold. However, an offer has been accepted and escrow was opened 3/26/08 and petitioner expects to be completed within 2 months.
2. Petitioner requests the administration continue an additional 60 days.

RECOMMENDATION:
Court's discretion.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0600332

CASE NAME: In re Matter of Hope Marie Johnson

VACATED- ACCOUNTING FILED AND IS SET FOR 5/15/08.

HEARING:

Hearing Re: REPORT OF STATUS OF ADMINISTRATION.

COUNSEL:

HOPE MARIE JOHNSON (MIN)...DONNASUE SMITH-ORTIZ
LINDA MAXWELL (TEE)...ELISABETH KEMPE-OLINGER

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700126

CASE NAME: RAFAELA ROSADO

HEARING:
Waiver of account and for final distribution.

COUNSEL:
KENNETH ROSADO (PET)...RICHARD J MCANDREW
RAFAELA ROSADO (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Fees and Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Statutory fees are \$7,466.72. Petitioner waives compensation.
2. Petitioner requests reimbursement of \$786.36 for cost advanced in administration of the estate. Itemized.
3. Submit order after hearing.

RECOMMENDATION:

Recommended for approval, absent objection. Court to set hearing re filing receipts and final discharge for **5/18/09**.
(kra/vet)

FUTURE HEARING DATES:
6/30/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700380

CASE NAME: JOSEPH HENRY BEECHER

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

ANGELA BEECHER SLOAN (PET)...HORSPOOL & PARKER
JOSEPH HENRY BEECHER (DEC)...

GENERAL INFORMATION

Continued from 12/10/07 on calendar error. Nothing new filed.

Continued from 3/17/08 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Probate petition granted 6/4/07, Letters issued on 11-14-07 \$400,000 bond.
2. No Inventory and Appraisal filed. Need Inventory and Appraisal.

RECOMMENDATION:

When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

Clerk to notice bonding company.

(/cbr/kra)

FUTURE HEARING DATES:

8/11/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700742

CASE NAME: LAWRENCE ALEXANDER MAIRS

HEARING:

Petition for WAIVER OF ACCOUNT AND FINAL REPORT BY EXECUTOR
ETC

COUNSEL:

DONALD B MAIRS (PET)...GERALD R LUNDBERG
LAWRENCE ALEXANDER MAIRS (DEC)...

**GENERAL INFORMATION Continued from 5-5-08 to allow petitioner to file
acceptance of the trusteeship. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Fees and
Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need named trustee's written acceptance of the trust filed with the court per Pr. C. §10954 (b) (4).
2. Petitioner as trustee of the Lawrence Mairs Trust is the sole heir and waives an accounting.
3. Attorney requests statutory fees of \$10,000.00 Petitioner waives compensation.
4. Petitioner requests to withhold \$20,000 for closing expenses.
5. Graduated filing fee schedule filed showing overpayment of fees. Petitioner requests refund of \$65.00 (not \$60.00 as stated on the schedule) to the estate.

RECOMMENDATION:

Clear note 1. If approved, court to set hearing re filing receipts and final discharge for
5/11/09.

(kra/vet/NMT)

FUTURE HEARING DATES:

11/12/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700794

CASE NAME: MTR OF CARMELITA KU

SEE ALSO 6

HEARING:
Hearing re: Inventory and appraisal

	COUNSEL:
PETER F GIH	(PET)...CHARLES L GROTTIS
CARMELITA KU	(DEC)...

GENERAL INFORMATION:

Continued from 4/7/08. No appearance. Court sets OSC re sanctions. Clerk mailed notice.

THIS CASE IS SET FOR HEARING ON Inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 10/2/07, no bond.
2. Final Inventory and Appraisal filed. However, need account statement verifying date of death balance per Local Rule 20-908.

RECOMMENDATION:

Clear note 2. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.
(kra/vet)

FUTURE HEARING DATES:

12/01/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700794

CASE NAME: MTR OF CARMELITA KU

SEE ALSO 5

HEARING:
OSC re: SANCTIONS

	COUNSEL:
PETER F GIH	(PET)...CHARLES L GROTTIS
CARMELITA KU	(DEC)...

GENERAL INFORMATION

Response to OSC re: Sanctions filed 05-01-08.

THIS CASE IS SET FOR HEARING ON OSC re Sanctions

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

- 1 Matter set on court's own motion when notes were not corrected and no one appeared at the time set for hearing re I&A on 4/7/08.
- 2 Clerk mailed notice to counsel.
- 3 Response to OSC re: Sanctions filed indicating counsel inadvertently did not calendar hearing as the reason for his non-appearance at prior hearing.
- 4 Supplemental Inventory and Appraisal filed 05-01-08.

RECOMMENDATION:

Court's discretion.
(kra/vet)

FUTURE HEARING DATES:

12/01/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0700898

CASE NAME: BEULAH BABCOCK

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

JAMES B. CHURCH	(PET)...	JAMES B CHURCH
BEULAH BABCOCK	(DEC)...	

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 10/29/07, no bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

(kra)

FUTURE HEARING DATES:

11/03/08 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800126

CASE NAME: BRIDGET AGNES HYLTON

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

ROBERT HYLTON (PET)...HERITAGE LAW OFFICES,APC
BRIDGET AGNES HYLTON (DEC)...

GENERAL INFORMATION:

Continued from 4/7/08 to clear notes.

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with full
authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Will states the testator was domiciled in the State of New York, but was made in the State of Massachusetts. However, the will is not self-proving under California law. Need either proof of subscribing witness to validate the will under California law or need authority establishing the validity of the will in the state of New York or Massachusetts at the time of execution (1967) per Pr.C.§6381.
2. Petitioner is the named executor and sole beneficiary under decedent's will. However, petitioner is listed as the ex-spouse of decedent. Under Pr.C.§6122 after executing a will the testator's marriage is dissolved, the dissolution revokes the disposition of the property made by the will to the former spouse and revokes any provision of the will conferring appointment on the former spouse. Question basis for appointment as executor. Need verified supplement or points and authorities.
3. Waiver of Bond and Nomination of Personal Representative filed by decedent's children, David Hylton and Sharon Palcsik.

RECOMMENDATION:

Need to clear notes. If petition granted, court will have to set future dates. Set hearing for filing of inventory and appraisal for 12-15-08. Set hearing for accounting review for 07-20-09. Accounting to be filed 30 days in advance.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800296

CASE NAME: SAMUEL P. REYES

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

WILLIAM REYES	(PET)...CARROLL M LAWSON
SAMUEL P. REYES	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by son

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Section 9 of the petition is incomplete as not all persons named in section 6(a)(5) living or deceased are listed and ages are listed as unknown. Need verified supplement listing all persons and their ages in order to ascertain if any heir is a minor.
3. Petitioner requests bond of \$5,000 as the estimated estate value is \$5,000 in personal property. However, minimum bond premium will buy up to \$20,000. Court may wish to set minimum bond of \$20,000.

RECOMMENDATION:

RFA subject to notes 1-2, \$20,000 bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800298

CASE NAME: CAROL ROSE TAYLOR SMITH

HEARING:
Petition to determine succession to Real Property

COUNSEL:
VICTORIA A MCCULLOCH (PET)...WILLIAM G. APGER
FRANKLIN RAYMOND BAYLISS (PET)...WILLIAM G. APGER
CAROL ROSE TAYLOR SMITH (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition to determine succession (estate
\$100,000 or less)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioners request a determination of decedent's interest in real property appraised at \$40,000 to pass to petitioners in equal shares through decedent's will. Copy of will attached.
2. Procedurally complete.

RECOMMENDATION:
Court's discretion.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800300

CASE NAME: EDNA MAE MAXWELL

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

JEFF A. MAXWELL (PET)...BETTY AUTON-BECK
EDNA MAE MAXWELL (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by son

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner requests no bond as all heirs waive bond. However, need bond waiver from Jeff Maxwell. Alternatively, court may wish to set full bond of \$226,000 based on the estimated estate value.

RECOMMENDATION:

Recommended for approval absent objection and court's determination re bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra/vet)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800308

CASE NAME: NITA HARMON

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

GINNY GREGORY (PET)...SUZANNE M GRAVES
NITA HARMON (DEC)...

GENERAL INFORMATION

Special Letters of administration issued 4/22/08, \$20,000 bond.

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA, by daughter

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of publication.
2. Petition is signed by "Ginny" Gregory. Section 9 of the petition lists heir "Virginia" Lu Gregory; question is this is one in the same. Need verified supplement.
3. Section 2(d)(2) re bond amount to be fixed is incomplete. Court may wish to set bond of \$225,000 base on estimated estate value.

RECOMMENDATION:

Recommended for approval subject to notes 1-3 and court's determination re bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: PROPS0800320

CASE NAME: DOROTHY GWENDOLYN ROBERTS

HEARING:
PETITION FOR LETTERS OF ADMINISTRATION W/WA W/FULL AUTHORITY
UNDER IAEA.

COUNSEL:

DELLA MCKINSTER (PET)...PAUL SHIMOFF
DOROTHY GWENDOLYN ROBERTS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with will annexed with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner alleges in section 7 of the petition that decedent is survived by **no** known next of kin. However, attachment 9 lists two persons as cousins. Question if these cousins are related to decedent. Need verified supplement.
2. Petitioner is not a named executor or named alternate executor in decedent's will; all persons nominated in decedent's will have either died or declined to act. Petitioner requests no bond as will waives bond. However, decedent's will only requests that "no bond be required of any executor nominated in this will". Thus court may wish to set bond of \$375,000 based on the estimated estate value.

RECOMMENDATION:

Recommended for approval subject to note 1 and court's determination re bond. If approved, set future hearings for filing of Inventory & Appraisal on **12/15/08** and for Accounting Review on **7/20/09**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: RPRRS02752

CASE NAME: GLORIA E. KENNEDY

HEARING:
Hearing re Final Discharge

COUNSEL:
DIANA L. KENNEDY (PET)...HARVEY M. PAYNE & ASSOCIATES
GLORIA E. KENNEDY (DEC)...

GENERAL INFORMATION

Continued from 11/20/07 and 2/25/08 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON filing of receipts and final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Final distribution approved 9/19/06.
2. No receipts or final discharge order have been filed.

RECOMMENDATION:

When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505. There is no bonding company to notice.

(/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06008

CASE NAME: MTR OF JESSE B JUEDEN

SEE ALSO 16

HEARING:
OSC re: SUSPENSION OF POWERS

COUNSEL:

SHARON WINDSOR	(PET)...	JAMES B CHURCH
JESSE B JUEDEN	(DEC)...	
KAMIE DUBELL	(OBJ)...	PRO/PER
INHERITANCE FUNDING COMPANY/DO	(PRO/PER)...PRO/PER
BOND SERVICES OF CALIFORNIA ()...	

GENERAL INFORMATION See matter on next page.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06008

CASE NAME: MTR OF JESSE B JUEDEN

SEE ALSO 15

HEARING:
Petition for SETTLEMENT OF 1ST/FINAL ACCT ETC

COUNSEL:

SHARON WINDSOR (PET)...JAMES B CHURCH
JESSE B JUEDEN (DEC)...
KAMIE DUBELL (OBJ)...PRO/PER
INHERITANCE FUNDING COMPANY/DO(PRO/PER)...PRO/PER
BOND SERVICES OF CALIFORNIA ()...

GENERAL INFORMATION

Continued from **7/9/07**. Bond exonerated. Objector to file supplement.

Continued from **8/13/07** to clear notes.

Continued from **9/24/07** at request of Kamie Dubell to clear notes.

Continued from **12/10/07** for declaration re non-marital status of Sharon Windsor.

Continued from **2/11/08** at request of counsel. Nothing new filed.

Continued from 4-7-08. Petitioner alleged that she does not know how to complete the accounting as the court wants it done and that she cannot afford to hire counsel. Court orders that Public Administrator be noticed of possible appointment and orders that Public Administrator appear at the time of the 5-12 hearing. Clerk has given notice. Nothing new filed.

THIS CASE IS SET FOR HEARING ON First and final account and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters of administration issued 11/9/04.
2. Petitioner reports that \$4,074 claim by Western Financial Services has been settled for payments of \$198/mo. Question how estate could be closed while payments are due. Also, petitioner does not state how long payments are to last. Need verified supplement. **Supp (filed 8/10/07): \$4,074.21 claim has**

- been paid in full. There are no schedules showing disbursements to cross-check payment. See other notes re lack of schedules.**
3. Petitioner reports that federal and state tax returns have not been filed because decedent's W-2 forms are in Sharon Windsor's possession. Question how estate can be closed with pending tax liability. **Supp: Returns are in the process of being filed.** Still cannot close account with pending tax liability.
 4. Petitioner alleges she is the only heir at law (and proposes distribution of the estate to herself) yet the probate petition listed surviving spouse and two daughters. Need verified supplement supporting claim of heirship and proposed distribution. **Supp: Proposed distribution changed to 50% each to the two daughters. Proposed distribution still does not account for spouse. Need additional verified supplement.** On 12/10/07 court finds that Sharon Windsor was never married to the decedent and there was never a marriage.
 5. If there will be more than petitioner as a residual heir, will need notice of hearing and proof of service for those individuals. **Need new proofs of service for new proposed heir(s).**
 6. Accounting does not balance on Summary of Accounts (\$299,210 charges, \$4,600 credits). Need corrected accounting. **Supp: New summary of account still shows the severely out-of-balance account.**
 7. Accounting is not complete. Need entries and schedules required by Pr.C. 1061-1064. **Not corrected in supplement.**
 8. No allegations are made regarding whether decedent or predeceased spouse received Medi-Cal benefits. Need verified supplement.
 9. Petitioner waives compensation. No atty involved for fees.
 10. **Objections filed by Inheritance Funding Company.** Objector alleges that Kamie Dubell assigned a portion of her inheritance (\$14,135) to objector. Objector alleges that there are two vehicles listed as property on hand. Objector requests that the vehicles be sold and the proceeds be paid to objector in partial/full satisfaction of their claim. On Page 2, line 7 of the objection, there is another reference in the petition to which objection is made which is ambiguous. Question whether other objections are being set forth? Supp: Disregard partial sentence added in error. Objector will not appear at hearing.
 11. **Supplemental petition for accounting filed 1/17/08. However, this is not a supplemental or amended accounting, but a list of assets. It is unclear if these are assets currently on hand or what petitioner is submitting. Need proof of service of Supplemental accounting.**

RECOMMENDATION

Need to clear notes.

(/kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06154

CASE NAME: MTR OF CHARLOTTE ELIZABETH TILTON

HEARING:

FIRST Account and Report of STEPHEN BIHLMEIER, DAVID P TILTON
and Petition for allowance of fees filed.

COUNSEL:

ANTOINETTE LLOYD (PET)...MCCLELLAN & WILSON
STEPHEN BIHLMEIER (PET)...MCCLELLAN & WILSON
CHARLOTTE ELIZABETH TILTON (DEC)...
DAVID P TILTON (PET)...D. HERSHEL W ILSON

GENERAL INFORMATION:

Letters issued to co-administrators 3/9/05

THIS CASE IS SET FOR HEARING ON 1st & current account and petition for fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 8/30/04 – 1/28/08. (3½ years)
2. Assets on hand \$800,264.13 consisting of real property and only \$264.13 in cash.
3. Need copies of bank statements verifying balance of property on hand per local rule 20-908.
4. Petitioners request authority to reimburse a total of \$10,706.28 in the following amounts at the time funds are available for costs advanced in the administration of the estate to: Jean Bihlmeier \$1,039.64, Mary Johnson \$1,352.25, Stephen Bihlmeier \$474.94, and David Tilton \$7,839.45. Itemized.
5. Petitioners request authority to reimburse a total of \$20,725.06 in the following amounts at the time funds are available for monies deposited into the estate account to: Mary Johnson \$4,000.00, Martha Larson \$5,600.00, Antoinette Lloyd \$3,600.00, Stephen Bihlmeier \$5,525.06, Jean Bihlmeier \$2,000.00
6. Petitioners request that any money advanced in the future toward the administration costs be entitled to receive interest at a rate of 8% compounded

monthly. Petitioners allege that not more than \$1,500/month will be needed.
JTD

7. Petitioners allege that the estate is not in a condition to be closed as the real property located in Redlands is not yet sold. Petitioners allege a notice of sale has been published and co-administrators are actively advertising the property for sale.
8. Petitioners request authorization to enter into a written contract with Copeland Wealth Management to secure a purchaser for the real property.
9. Petitioners request an additional 8 months continuance in order to close the estate.

RECOMMENDATION:

Need to clear note 3. If approved court to set next hearing re Accounting Review for

5/18/09

(kra)

FUTURE HEARING DATES:

6/30/08 First and final report or follow-up status report (Note: may be vacated as accounting is now before the court)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06266

CASE NAME: EST OF MARK R RAMIREZ

HEARING:
Status Conference

COUNSEL:
VALERIE J CARRILLO (PET)...ROBBINS & HOLDAWAY
MARK R RAMIREZ (DEC)...
DELMAR J RAMIREZ (OBJ)...MARK J. A. FLORY

No calendar notes as this is on for Status Conference

FUTURE HEARING DATES:
6/05/08 SECOND AND FINAL Account and Report of VALERIE J CARRILLO and Petition
for allowance of fees filed.

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS06358

CASE NAME: EST OF FLORALEE S PITCHFORD

HEARING:
Hearing Re: Receipts and Final Discharge.

COUNSEL:
BERYL ANN SWINGLE (PET)...E. JOAN NELMS
FLORALEE S PITCHFORD (DEC)...
RICHARD E BAWDEN (TP)...RICHARD E BAWDEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Final accounting approved 5/7//07.
2. Need receipts.
3. Need Ex-parte petition/order for final discharge submitted.

RECOMMENDATION:

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 2655.
(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 9:00 DEPT: E2

CASE #: SPRSS07046

CASE NAME: ESTATE OF STAN PRO

HEARING:

Waiver of account and for final distribution.

COUNSEL:

STEVE PRO	(PET)...RICHARD G SIMON
STAN PRO	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Fees and Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need notice of hearing and proof of service.
2. Petition caption indicates the account is waived. However, no waivers of account filed. Need waivers from all heirs or an accounting.
3. Petitioner proposes distribution per stipulated agreement. However, one of the heirs is a minor (16). Question if there is a guardianship of the estate established. Does court wish to appoint a guardian ad litem for the minor? JTD
4. Statutory fees are \$27,029.64.
5. Attorney requests extraordinary fees of \$2,475.00 for the preparation of the distribution agreement, hearing re sale of securities, and sale of real property. Billing is based on a rate of \$275/hour for 9 hours. The court will generally not consider awarding extra-ordinary fees until the executor and/or counsel establish that all ordinary fees have actually been earned. (In re Walker's Estate (1963) 221 Cal. App. 2d 792). File verified supplement.
6. In the report petitioner requests to withhold \$10,000 for closing expenses. However, in the prayer petitioner requests only \$5,000. Need verified supplement clarifying the amount requested.

RECOMMENDATION:

Need to clear notes. If approved, court to set hearing re filing receipts and final discharge for **5/18/09**.

(kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

CONSERVATORSHIP

DATE: 05/12/08 TIME: 10:30 DEPT: E2

CASE #: CONPS0700194

CASE NAME: MARIA DEL CARMEN JACQUEZ

HEARING:

Hearing Re: CONSERVATORSHIP COMPLIANCE REVIEW.

COUNSEL:

RICARDO L JACQUEZ (CP)...PRO/PER

AMPARO JACQUEZ (CP)...PRO/PER

MARIA DEL CARMEN JACQUEZ (CTP)...JAMES B CHURCH

GENERAL INFORMATION:

Continued from 2/4/08. No appearance by conservators and no care plan filed. Court sets OSC re Sanctions. Clerk mailed notice. **Court orders Spanish interpreter.** Nothing new filed.

Continued from 4/7/08 as petitioner is directed to complete the form and show proof of service. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Conservatorship compliance review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Court appointed Limited conservatorship of the person only on 10/1/07.
2. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
3. As Conservatee is developmentally disabled and receiving benefits from IRC, no care plan is required per Pr.C.§2352.5(e).

RECOMMENDATION:

Need to clear note 2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 10:30 DEPT: E2

CASE #: RC RS00256

CASE NAME: ANGELA JENNER

HEARING:
Accounting Review

	COUNSEL:
GARY JENNER	(PET)...PRO/PER
TAMAR LAFLEUR	(PET)...PRO/PER
VICKY A MATTHES	(PET)...J. DAVID HORSPOOL
ANGELA JENNER	(PCE)...FULLERTON LEMANN SCHAEFER & DO
PUBLIC GUARDIAN	(TP)...PRO/PER

GENERAL INFORMATION:

Continued from 1/14/08 at request of counsel: waiting on information form client.

Continued from 3/17/08 at request of counsel to clear notes.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. 5th Accounting is due for the period: 10/1/06 – 9/30/07.
2. No accounting is filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notice bonding company.

(gls/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 10:30 DEPT: E2

CASE #: RC RS00434

CASE NAME: *MF* EMMA V ORTIZ

HEARING:
Accounting Review

	COUNSEL:
ROSARY ORTIZ	(PET)...THOMAS E BANDY
GILDA ORTIZ	(PCR)...
EMMA V ORTIZ	(PCE)...DONNASUE SMITH-ORTIZ
LINDA MAXWELL	(SC)...
DAVID A ORTIZ	(PET)...LAYNE A BART HOLOMEW
APRIL C WOODS	(PET)...LAYNE A BART HOLOMEW
LINDA M GOMEZ	(SC)...LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 5/1/07 court approved the 2nd account; 3rd accounting now due covering the period 12/1/06 – 11/30/07.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.
(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 10:30 DEPT: E2

CASE #: SC SS00952

CASE NAME: IN THE MATTER OF DAVID PEEK

HEARING:
Accounting Review

	COUNSEL:
DAVID PEEK	(CEP)...
WILLIAM PEEK	(SC)...KELLER & KELLER
MEDICAL CENTER	(TP)...SUSAN G KOONTZ

GENERAL INFORMATION:

Third Account due for the period 3/1/05 – 2/28/07

Continued from **6/14/07, 8/2/07, 10/4/07, 12/6/07 and 02-14-08** at request of counsel. At 12/6/07 hearing, counsel advises that the accounting would be filed that date. Nothing new filed.

Continued from 3/27/08 at request of counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. No accounting is filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(/vet/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 05/12/08 TIME: 10:30 DEPT: E2

CASE #: SC SS02622

CASE NAME: MTTR OF BARBARA LOUISE JAMESON

HEARING:
Accounting Review

COUNSEL:

MELODIE Z SCOTT	(CPE)...	HARTNELL HORSPOOL & FOX
BARBARA LOUISE JAMESON	(CEP)...	DONNA LEE STURGILL DIAZ
STEPHANIE TITUS BOOTH	(CPE)...	JAMES B CHURCH
BRYAN C HARTNELL	(CPE)...	E. JOAN NELMS
PATRICIA L GRAY	(TP)...	PRO/PER
JOHN F HANSCOM	(PRO/PER)...PRO/PER
BARBARA BILSKY	(PRO/PER)...PRO/PER
PATRICIA L GRAY	(PRO/PER)...PRO/PER

GENERAL INFORMATION Continued from 4-7-08. At the time of the 4-7 hearing counsel advised that the accounting would be filed by the end of the week. Nothing new filed.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 6/18/07 court approved the 1st account; 2nd accounting now due covering the period 2/6/07 – 2/5/08.
2. No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(kra).

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **MISC.**

DATE: 05/12/08 TIME: 1:30 DEPT: E2

CASE #: SPRSS06510

CASE NAME: MTR OF THE EMMA MARY RAGO TRUST

OUT FOR READINESS ON 05/08/08.

HEARING:
Court Trial -- Estimated trial length *** hrs.

COUNSEL:
EUGENE V MAROCCO (PET)...THOMAS W DOMINICK
RONALD MAROCCO (OBJ)...LAW OFFICE OF J. DANA MITCHEWE

No calendar notes as this is on for Court Trial

FUTURE HEARING DATES:
5/13/08 Court Trial

CIVCAL4 Superior Court - Redlands - Probate
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

DATE: 5/12/08 TIME: 1:30 DEPT: E2

CASE #: SPRSS06544

CASE NAME: ESTATE OF SOCORRO A LOPEZ

HEARING:

FIRST Account and Report of EDWARD LOPEZ and Petition for allowance of fees filed.

COUNSEL:

EDWARD LOPEZ (PET)...JAMES B CHURCH
SOCORRO A LOPEZ (DEC)...
DEPARTMENT OF HEALTH SERVICES (TP)...PRO/PER
RONALD W. ASK (RONALD W ASK)...RONALD W
ENEDINA LOPEZ (ZIPRICK & CRAMER)...ZIPRICK &

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Evidenciary hearing on first accounting.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Objections have been raised to the first account. Matter is contested and set for a contested hearing.

RECOMMENDATION:

None.